

## **Westfield Contributory Retirement System Document Scanning Project**

The Westfield Contributory Retirement System (hereinafter referred to as the “System”) is soliciting proposals from qualified firms for a one time document scanning project. Proposals must be submitted no later than 01/28/2022.

### **Timing Considerations:**

Qualified firms wishing to submit a proposal for providing scanning services should submit via email to: Liam Browne – [Liam.Browne@cityofwestfield.org](mailto:Liam.Browne@cityofwestfield.org).

In addition, a hard copy of the proposal should be mailed to:

Westfield Contributory Retirement System  
Attn: Liam Browne  
Po Box 106  
Westfield, MA 01086

Deadline for submission is **Friday, January 28, 2022 1:00 PM**. Any proposals received after 1:00 PM will not be accepted. The Proposal should address the proposed services and provide a fee breakdown for the service.

Any questions related to the terms of the Request for Proposal should be directed to:

Liam Browne, Director  
[Liam.Browne@cityofwestfield.org](mailto:Liam.Browne@cityofwestfield.org)

The Westfield Contributory Retirement System (“System”) is a public pension fund established under M.G.L. Chapter 32. The System has approximately 1,091 active members and pays benefits to 719 retirees and beneficiaries. The System is managed by a five-member Board and the office staff consists of two full-time employees.

### **Background**

The System currently maintains all records in hard copy. This includes files for each member and retiree, as well as files for a substantial number of former employees and deceased retirees, which we are required to maintain permanently.

All staff members currently use Microsoft Windows and Office Suite. A database of members and retirees, called PensionPro (hereinafter referred to as “PTG”), is provided by Pension Technology Group ([www.ptgma.com](http://www.ptgma.com)). Scanned documents and reports are generated in PDF format.

# **Westfield Contributory Retirement System**

## **Document Scanning Project**

### **Scope of Services**

Our primary concern is that the office is entirely reliant on paper copies of records, and that duplicate copies do not exist. We wish to have duplicate electronic copies created and to store the records in an electronic format both within the office, and in an off-site location, specifically the electronic documents must be loaded into the PTG software. (inability to load into PTG will be disqualifying)

It is our intention to have the work of scanning existing paper documents be performed by the proposer as quickly as reasonable, limiting the time that files would need to be outside of the office. Any new documents will be manually scanned by the employees of the system.

The following criteria must be met:

### **Standards**

- Any and all documents in the possession of the Proposer must be stored in a climate controlled safe and secure location.
- The System must have access to all documents outsourced for scanning upon request, with a hard copy or electronic file provided within 24 hours
- File type must be compatible with PTG in order to be uploaded
- Duplex scan documents to capture both front and back of document where needed
- Images must be oriented correctly for viewing
- Image Clean-up: the scanned document should be de-skewed and de-speckled, blank pages and black borders removed and background suppression where the image will be enhanced by such processes
- Manual image quality adjustment and QA of every image for clarity, quality, cut-offs or compression errors
- Documents indexed with up to 10 fields. Indexing sources may include scan sheets, file folders, and/or image verification
- All scan dimensions must be the same size as the original document
- Images are to be provided on an archival quality DVD that cannot be altered or changed
- OCR all content with guarantee of 99.5% accuracy on images

### **Quality Control**

The System's expectation is for a high level of quality control for images and indexing. Proposer's quality control measures shall meet the following criteria for all images:

- Images are of the same or better quality than the original
- All documents are to be scanned in the same order they exist in paper form
- All images are accurately labeled and indexed
- Visual inspection of each image, making quality adjustments as needed
- The System shall perform a QA of images and associated indexing. If the System discovers unacceptable images, the proposer, at no additional cost to the System, will correct all such unacceptable images.

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## **Scanning Process**

- Proposer is to provide a test run prior to commencing project. Test sample size is to be determined. Project will not continue until System has signed off on quality and job performance of test.
- Proposer is to enhance any “low quality” images that are determined, by the proposer, to have enough quality to produce a readable digital image
- Proposer to add an image stating “Poor Quality Original” to any image that contains unreadable text or graphics. Stamp is only to be used after 2 scan attempts to improve quality and is not to be used as a substitute for thorough and accurate scanning. If this is necessary, the proposer must relay this to the System.

## **Evaluation Criteria**

The following criteria will be utilized when evaluating your response to the Request for Proposal. This is not to be considered an inclusive list.

- \* Organization's experience, specifically experience involving Massachusetts public pension funds
- \* Customer references
- \* Ability to meet standards listed
- \* Cost

Each response will be rated on the following method: Highly Qualified; Qualified; Not Qualified.

## **Required with Submission**

### Vendor Experience and Qualifications

1. Please provide a brief background of your organization.
2. Please provide a brief background/history of the solution you are proposing.

### Competitive Analysis

1. Describe what generally differentiates you from your key competitors.

### References

1. How many Retirement Systems in Massachusetts have utilized your solution?
2. Please provide 3 Systems as references